

We want your experience with changing banks to be as simple as possible. Take advantage of this switch kit to help keep the process organized.

SWITCHing is Easy!

SWITCHing to Commencement Bank is easy with this 4-step process:

- 1. OPEN YOUR NEW COMMENCEMENT BANK ACCOUNT:** We will help you choose the account that best fits your needs. Using the Deposit and Payment tracker provided, you will be able to easily move through the remaining steps.

Documents Needed to Open Your New Account:

- Government issued photo ID (Driver's License or Passport)
- 2nd piece of ID (if requested)
- Mother's Maiden Name
- Address
- Employment Information
- Social security number
- Previous month banking statement (optional – this will help us determine the best account for you and help identify any payments or deposits that will need to transition to your new account).

- 2. CHANGE/SET-UP DIRECT DEPOSIT:** You can use our Direct Deposit Authorization Form to send to any agencies or employers. It is normal for agencies to take a month or more to complete your direct deposit change requests. We can also help you with how to SWITCH your Social Security Deposit to your new account.
- 3. CHANGE ANY AUTOMATIC PAYMENTS:** We can work with you to identify any automatic withdrawals from your previous banking statement. Once you have established a list of companies you will need to contact, the process is easier to keep track of. You can use our Deposit and Payment Tracker to help organize the process. We have also created an Auto Payment Authorization Form for you to send to any companies who want your request to be in writing.
- 4. CLOSE YOUR OLD ACCOUNT(S):** Once all your deposits and auto-payments have been successfully switched to your Commencement Bank account, you're ready to close your old account(s). The safest way to ensure you won't be charged additional fees and that the account is truly closed is to provide the Account Closing Request Form to your other financial institution.

Thank you for choosing Commencement Bank!

Our deposit and payment tracker helps track your deposits and withdrawals that need switched to your new Commencement Bank account. Make sure to keep this account information secure. Consider shredding upon completion.

Your Bank Account Information

- Bank Routing Number: _____
- Your Bank Account Number: _____

RECURRING DEPOSITS MADE TO YOUR PREVIOUS ACCOUNT

Deposit	Company	Next Scheduled Deposit	Contacted Company	Deposit has Come Through New Account
Payroll			<input type="checkbox"/>	<input type="checkbox"/>
Pension			<input type="checkbox"/>	<input type="checkbox"/>
Social Security			<input type="checkbox"/>	<input type="checkbox"/>
Other			<input type="checkbox"/>	<input type="checkbox"/>

RECURRING PAYMENTS MADE FROM YOUR PREVIOUS ACCOUNT

Deposit	Company	Next Scheduled Deposit	Contacted Company	Deposit has Come Through New Account
Mortgage			<input type="checkbox"/>	<input type="checkbox"/>
Vehicle Payment			<input type="checkbox"/>	<input type="checkbox"/>
Insurance			<input type="checkbox"/>	<input type="checkbox"/>
Phone Bill			<input type="checkbox"/>	<input type="checkbox"/>
Electricity			<input type="checkbox"/>	<input type="checkbox"/>
Gas			<input type="checkbox"/>	<input type="checkbox"/>
Water			<input type="checkbox"/>	<input type="checkbox"/>
Other			<input type="checkbox"/>	<input type="checkbox"/>
Other			<input type="checkbox"/>	<input type="checkbox"/>
Other			<input type="checkbox"/>	<input type="checkbox"/>
Other			<input type="checkbox"/>	<input type="checkbox"/>
Other			<input type="checkbox"/>	<input type="checkbox"/>



Prior to completing this authorization, check with your employer or company you receive a direct deposit from **to ensure they do not have their own required form.**

COMPANY INFORMATION

Change

New

Company Name: _____

Company Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____

INDIVIDUAL INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____

I am closing my:

Checking Account

Savings Account

Account Number: _____ at _____

(Previous Financial Institution)

Located at _____

(Address)

I hereby authorize the transfer of my direct deposit to my new bank, Commencement Bank, and submit this letter as written authorization.

Please begin sending the deposit(s) directly to:

Commencement Bank

1102 Commerce St, Tacoma, WA 98402 | Routing number: 125108887

Deposit Instructions

Please deposit entire amount into checking account # _____

Please deposit \$ _____ into savings account # _____

and the remainder to checking account # _____

I authorize the company listed above to initiate deposit of funds to my Commencement Bank account(s). This notice to remain in effect until I send written notice of change or cancellation.

Signed: _____ Date: _____

Print Name: _____

Prior to completing this form, check with the company you send an automatic payment to and **ensure they do not require their own specific form.**

AUTO-PAYMENT AUTHORIZATION Change ☐ New ☐

Vendor/Payee Name: _____

Vendor Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ Account Number with Vendor: _____

CUSTOMER INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____

Effective immediately, I/We authorize the above referenced vendor/payee to initiate entries to my
new account number: _____ Checking Account ☐ Savings Account ☐

Commencement Bank
1102 Commerce St, Tacoma, WA 98402 | Routing number: 125108887

This authorization will remain in effect until I notify Vendor to cancel request.

Signed: _____ Date: _____

Signed: _____

(If second signature is required)



Prior to completing this form check with your former financial institution to **ensure they do not require you fill out their own specific form.**

CUSTOMER INFORMATION

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____

Accounts (List account numbers and types you would like to close)

Account #: _____	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>	Other <input type="checkbox"/>
Account #: _____	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>	Other <input type="checkbox"/>
Account #: _____	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>	Other <input type="checkbox"/>
Account #: _____	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>	Other <input type="checkbox"/>

I/we hereby authorize the closure of the above listed account(s). Please mail any funds remaining in these accounts to:

☐ Me, at the above address

☐ Commencement Bank _____
(List your local branch address)

Account number to be referenced on check:

☐ If applicable, please discontinue my Bill Pay and Online Banking Services

☐ If applicable, please cancel my debit card

Signed: _____ Date: _____

Signed: _____
(Signature of Primary Account Holder)

Prior to sending this form, please review your deposits and auto-payments to ensure they have been changed to your new Commencement Bank account.

How to Set Up or Change Direct Deposit of Benefit Payment Online....

1. **Log in to your account.**
2. **Sign in** and Select the blue **Benefits & Payment Details** link on the right side of the screen.
3. Scroll down and select the **Update Direct Deposit** button, and choose if you are the owner or co-owner of the bank account.
4. Enter your bank account information and select **Next**.
5. Review and verify your banking information and select **Submit** then select **Done**.
6. You can also decide when your change will take effect, by simply using the My Profile tab within my Social Security.

Still have questions?

If you have questions or need help understanding how to set up or change direct deposit online, call our toll-free number at **1-800-772-1213** or visit your Social Security office. If you are deaf or hard of hearing, call our toll-free TTY number, **1-800-325-0778**, between 8:00 a.m. and 5:30 p.m. Monday through Friday.

If you receive Supplemental Security Income (SSI) payments, please call their toll-free number at **1-800-772-1213** for assistance.

In Person or by phone:

Tacoma Office

Address: 2608 S 47th St Ste. A, Tacoma, WA 98409
Phone: (888) 487-9229

Puyallup Office

Address: 811 S Hill Park Dr, Puyallup, WA 98373
Phone: (855) 886-9627

Kent Office

Located in: Kent Station®
Address: 321 Ramsay Way #401, Kent, WA 98032
Phone: (866) 931-7671

Thurston Office

Address: 402 Yauger Way SW, Olympia, WA 98502
Phone: (866) 755-6199

INFORMATION NEEDED TO MAKE CHANGES:

Current Bank Name _____
Current Bank Routing # _____
Current Account # _____
NEW Bank Name _____ Commencement Bank _____
NEW Bank Routing # _____ 125108887 _____
NEW Account # _____